How OPAA! is retaining customers and enabling collaboration with Microsoft 365

ABOUT

Opaa! chose the power of Microsoft cloud technologies and the experience of Gold Partner Valorem Reply to help them become a modern workplace with empowered employees who could efficiently collaborate, communicate and coordinate to better serve their communities, retain customers and grow their business. This is the story of how Opaa! leveraged leading-edge technology with expert guidance and custom digital solutions to digitally transform their business.

A fast-growing, food management company serving over 250,000 K-12 children across the Midwest Opaaa! realized their on-premises, email reliant workflows were not scaling with company growth. In order to maintain the high levels of customer satisfaction, they had come to expect and continue to be a market leader, Opaa! Food Management executives decided something must be done to integrate automation and efficiencies into their workflows.

CHALLENGES

- Team collaboration, communication, and coordination delays caused by outdated tools were increasing incident resolution times and introducing risk to customer satisfaction scores and new business opportunities.
- Internal resource limitations for planning, deploying and managing the cloud infrastructure migration necessary to become a modern workplace.
- Inadequate redundancy and backup capabilities to maintain system integrity.
- Little executive insight into account successes, incidents or day-to-day operations.
- Field resources sacrificing valuable time on account activities due to limited remote access.

SOLUTIONS

- A strategic roadmap for migrating to the cloud using best practices and agile application deployments.
- Fully customized SharePoint 365 based Incident Management System with automated workflow notifications and multi-media support.
- User-led design of a custom SharePoint 365 based Opaa! Intranet
- PowerApp based secure, mobile app access to incident management tools for remote staff.
- Adoption framework and training documentation to aid in employee change management.

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RESULTS

- Faster incident resolution times for clients
- Increased transparency for executives throughout the incident lifecycle
- Mobile device access for field staff
- Safe and secure foundation for migrating future business applications to the cloud
- Flexible platform for integrating other business systems and increasing process automation
- Roadmap for next phase of digital transformation: Becoming a data-driven culture
- Adoption communication plans and change management strategy in place to maximize usage rates and ROI

"During our Office 365 Envisioning Session, the Valorem Reply team had the opportunity to meet the majority of Opaa!'s corporate operational staff, including remote field reps, and learn about the challenges they were facing. This gave us a better understand of the needs of the company as a whole so we could envision a solution that would satisfy all stakeholders without drastically changing the scope of work"

Bill Feldker, Business Productivity Cloud Architect, Valorem Reply

"For Opaa!, customer loyalty is paramount. We are a high-touch organization with an entire support structure of regional directors, trainers, dieticians and chefs to support each of our school districts. However, as our business grew, we realized we needed much better means of communication and collaboration to enable those support teams to be the most effective and best serve our children and communities."

– Craig Cohen, EVP, Opaa! Food Management

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THE OPPORTUNITY

Opaa! Food Management is a family-owned and operated food services company based in Chesterfield, Missouri responsible for food service programs at over 600 schools across seven states in the Midwest. Since their start in 1978, their made-from-scratch and locally sourced approach to child nutrition has led to continuous growth. Within the past eight years the organization has almost tripled in size to reach over 3,500 employees spread over 225 public school districts. Before partnering with Microsoft and Valorem Reply, Opaa!'s primary tools for monitoring, tracking and resolving day-to-day operational issues and tasks at each account consisted of on-premises SharePoint 2003 and email. The disparate nature of these dated tools combined with a growing geographically dispersed workforce and client base caused inefficient communication and collaboration among internal teams. This led to a chain reaction of ambiguous coordination efforts, longer resolution times and customer satisfaction issues.

"For organizations to maintain competitive advantage in the modern era of business, having the right business productivity tools can mean the difference between a market leader and a business at risk. Instead of simply investing in the latest and greatest technologies and tools, it's important for businesses to make strategic investment decisions for their unique needs. An Envisioning and Planning workshop with Opaa! gave the Valorem Reply team a holistic look at the unique business goals and challenges facing leaders. Through this information gathering and strategy session, we were able to build digital solutions that satisfied their current business needs with the flexibility to scale as operations grow."

Marcus Ruyle, Business Productivity Manager, Valorem Reply

In order to measure their success, Opaa! employs the Net Promoter Score (NPS) methodology in which customer loyalty is determined by a client's willingness to recommend goods and services to a friend or colleague. While retention rates remained high at over 98% and NPS scores above industry averages, leaders knew that in order to continue providing the best services to their clients and the lowest costs, they would need to proactively seek opportunities to increase efficiencies and effectiveness. With internal communication and collaboration as their first focus area, Opaa! made the decision to move to the cloud.

"We strive to go beyond the customervendor relationship and become a business partner for each of our school districts. Part of being an excellent business partner is ensuring we do all that we can to keep costs low and quality high for our clients. We knew the operating expense model, flexibility and scalability of the Microsoft cloud would give us the tools we needed to immediately increase our business capabilities."

Craig Cohen, EVP, Opaa! Food Management

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LEVERAGING THE MICROSOFT CLOUD ON THE PATH TO DIGITAL TRANSFORMATION

Opaa!'s path to modernization began a few years ago with investments in cloud solutions for human resource management and menu planning. With experience using both out of the box and custom solutions, Opaa! leadership knew their teamwork and incident management initiative would require a platform that could provide:

- Scale for organizational growth
- Design flexibility to meet their unique needs and integrate with other systems
- Industry best standards for digital security, backup and redundancy

"Microsoft is the industry standard when it comes to business productivity so we were confident Microsoft 365 had the power and security to handle our needs now and in the future. We found the operating expense model of the Microsoft cloud more attractive than the capital intensive model of other solutions and were confident in their back up and redundancy capabilities."

Craig Cohen, EVP, Opaa! Food Management

With a limited supply of internal resources to take on this important move with the customization they knew the project would require, Opaa! decided to seek out a Microsoft partner with deep cloud expertise to help them strategically plan and build a cloud solution that would:

- Not interrupt ongoing operations
- Maintain scope and control costs
- Meet the needs of all stakeholders
- Better prepare Opaa! for the future

To ensure their move to the cloud was smooth and efficient, Opaa! sought out the expertise of trusted Microsoft Gold Partner, Valorem Reply, to plan and lead their transition using industry best practices and creating a solid foundation for future growth.

"We were really looking for somebody with an expertise to help guide us and make sure we were taking full advantage of the M365 tools that could help us drive our business and our goals forward."

Craig Cohen, EVP, Opaa! Food Management

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THE IMPLEMENTATION

To kick off the project and ensure a strategic rollout of their new solutions, Opaa! took advantage of Valorem Reply's Microsoft 365 Envisioning and Planning Session. During this workshop Opaa stakeholders worked alongside Valorem Reply cloud specialists to plan and execute their move to the cloud with short and long-term goals in mind. This comprehensive analysis and work session allowed Valorem Reply cloud migration experts to hear from a wide array of cross-functional Opaa! team members and understand the holistic needs and wants of the organization. By interviewing and immersing themselves in the Opaa! business and culture, Valorem Reply was able to not only uncover process, people and technology gaps but also opportunities to leverage existing assets with Microsoft 365 solutions for a faster return on investment.

The outcome of this expert-guided engagement was a strategic, goal-oriented plan that would guide Opaa! in:

- Moving business applications to the cloud using best practice permission, security and document purging processes.
- Implementing the Powell 365 SharePoint Intranet solution to reduce cost and delivery time of their new Microsoft 365 Intranet.
- Developing an incident management system with automated workflows and secure access management.
- Better managing video and photo storage and streaming.
- Implementing other modern collaboration solutions to achieve business goals

"Going through the Envisioning and Planning process exposed us to potential opportunities to broaden the use of Office 365 tools more than we had initially envisioned. It opened our eyes to being able to leverage the platform more effectively. I would encourage any business leader considering a digital solution to begin with this step in order to strategically plan and maximize results from the investment."

Craig Cohen, EVP, Opaa! Food Management

DIGITAL SOLUTIONS TO DRIVE CHANGE

"During the exploration phase, Valorem Reply suggested Powell365's Intranet design tool instead of a building a custom coded solution to help us maximize our available budget. Powell365 provided a lot of visually appealing aspects and will make it easier for us to manage our Intranet in the future."

Jordan Boatman, Information System Administrator, Opaa! Food Management

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Once their data and assets were safely in the cloud, the next step was to ensure Opaa! employees could quickly and easily locate that information. In order to provide the most engaging and easy-to-use digital workplace as quickly and cost efficiently as possible, Valorem Reply brought in long-time Microsoft Partner and SharePoint enthusiasts Powell Intranet. Powell Intranet has over 70 ready-to-use SharePoint templates as well as a unique design tool called the Powell Manager to simplify the design process within SharePoint for those organizations seeking a lower cost alternative to a custom build. Valorem Reply designers used the Powell Manager solution to create a user-led, brand aligned interface for staff to collaborate and access subject matter experts regardless of their geographic locations.
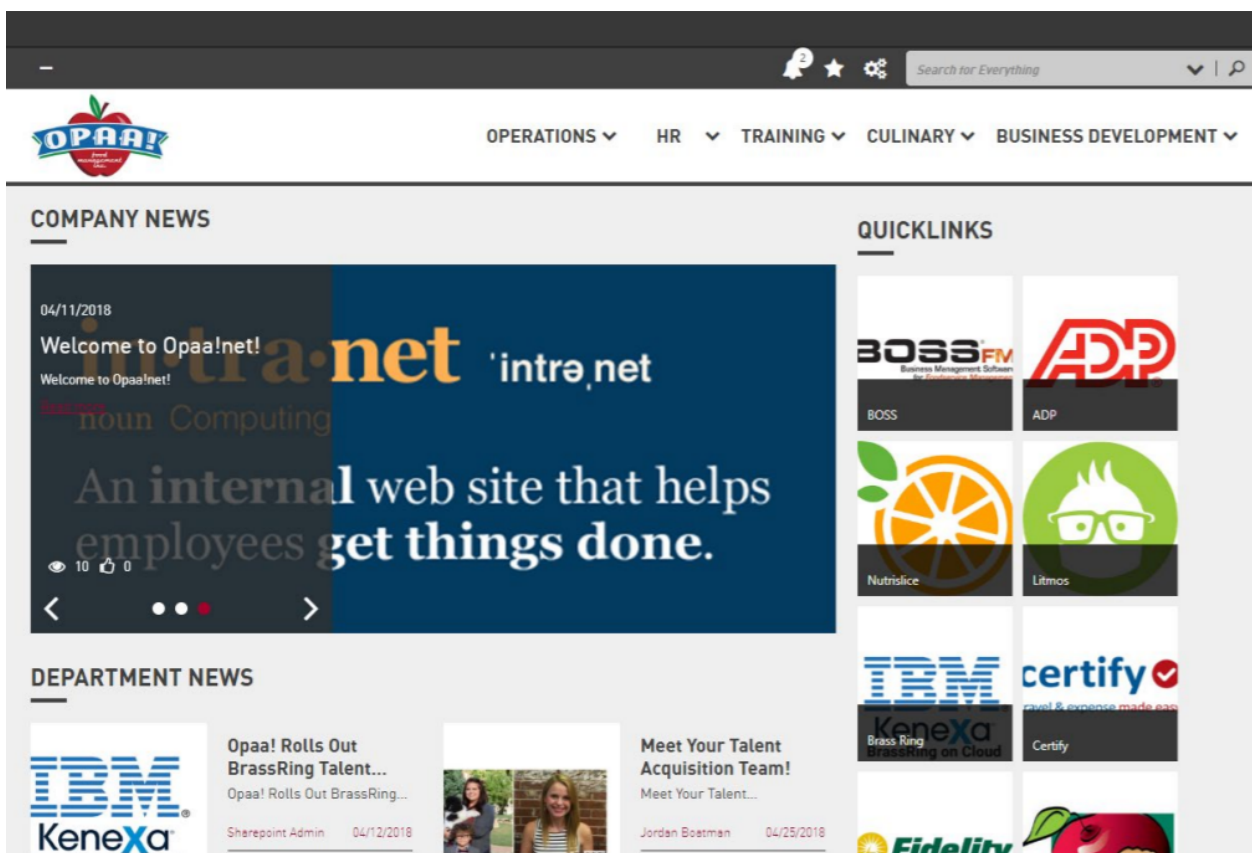
For optimizing and improving the incident management process at Opaa!, Valorem Reply Business Productivity experts worked closely with both the field teams and corporate operational staff to build a custom solution that enabled more efficient crossteam collaboration and executive insight. The resulting SharePoint-based solution uses Microsoft Forms and Workflows along with the new Intranet to make it easy for employees to create and update incidents in real-time. Using SharePoint Online and Power Apps, Opaa!'s new custom incident management workflow can be initiated on any device directly from the newly optimized Opaa! Intranet. Microsoft's Access Management features allow approved users to submit a form describing the incident

and attach supporting photos and videos to clearly and accurately document all details. Once submitted, that form automatically triggers workflows for the team(s) that are integral in the management and completion of each incident. Throughout the incident lifecycle, the workflow updates the leadership team with email notifications as the incident progresses to resolution, turning what was once a fragmented and siloed chain of emails into real-time, reliable and automated business processes. This new system not only transformed Opaa's incident management and operational processes but also laid the foundation for better resource management and knowledge sharing as well as data collection to better predict and avoid incidents in the future.

As technology changes and evolves, digital transformation becomes a continual journey. For Opaa!, their new cloud solutions to empower teams and create operational efficiency has kick started their journey to a modern workplace and better prepared them for what's to come. Enabling employees with access to real-time information sharing and communication tools as well as mobile access while in the field will have an immediate effect on customer service abilities and satisfaction scores. The next step in superior service and customer loyalty for Opaaa! is gathering the insights and intelligence available through these new tools to predict future incidents and strategize ways to overcome and avoid them

> "The most surprising part about working with Valorem Reply was that there weren't any surprises. While the scope may have shifted as we learned more about breadth of capabilities in the Microsoft 365 platform, we haven't had to make any drastic changes to the plan to get there thanks to Valorem Reply's very effective process."
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> *Jordan Boatman, Information System Administrator, Opaa! Food Management*

A major part of the strategic plan to build a new digital solution is to consider the people who will be using this new tool(s). Opaa! is maximizing their return on investment by working with Valorem Reply adoption and change management specialists to develop staff communication and training frameworks.

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Through a combination of on-site cultural assessments and executive technology sessions Valorem Reply experts will provide leaders with the knowledge and skills necessary to integrate these new tools and processes into their workplace culture from the top down.

> "Our new incident management system and Intranet projects are an important stepping stone in our digital transformation journey. I think it's going to cause us to be more collaborative and a better user of resources. We're spread out all over the Midwest, now with Skype for Business and Teams we can be more efficient using technology to get things done and keep costs low for our clients without sacrificing the high-quality service we expect. Simple things like screen sharing are going to greatly improve our efficiency and effectiveness as a company and allow us to provide high quality service at the lowest possible cost to the communities we serve."
>
> *Craig Cohen, EVP Opaa! Food Management*

A RELIABLE FOUNDATION FOR GROWTH AND SCALE

While their incident management system and new Intranet are already enabling employees to get more out of their day and provide clients with the highest quality service and care, another benefit of Opaa!'s new tools is the data they are now capturing and leveraging to make better business decisions. Insights into the behaviors and habits of their customers, employees, partners and vendors can help Opaa! leadership establish KPIs that will guide them to their goals faster.

With the secure cloud foundation laid, Opaa! can easily implement AI and Modern Data Platforms to build creative dashboards and end-toend views of their business. Capitalizing on this deep and valuable insight will not only allow them to make more confident business decisions but also identify and leverage successes across the organization. Future plans to leverage Microsoft technologies include a client facing extranet that will allow Superintendents to more easily access information on their account. The story of digital transformation has no definitive end and the path rarely looks the same for each organization. However, Opaa! now has a head start on reaching their digital goals with cloud-first, mobile-first business productivity tools strategically designed by Valorem Reply and supported with reliable Microsoft technology. Continuing to leverage modern workplace solutions available within the Microsoft 365 ecosystem will enable leaders to better serve their clients, scale operations for growth and become a market leader. Efficient collaboration features made possible with Microsoft Teams and additional development of their PowerApps tools, this fast growing food management organization is excited to apply their increased visibility and business insights to new lines of business such as business development and resource management.

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Powell Software develops digital workplace solutions that improve the employee experience, helping companies write their own "future of work" by leveraging the talent of their entire workforce.